

Client's Name: _____

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into consideration when treating any of the current diagnoses. For example, surgical history of hernia repair, appendectomy, traumatic amputation, history of Rheumatic fever, pneumonia at age 30, etc.

2. Significant family history
 3. Review of all systems
 4. Physical exam
 - a. Vital signs
 - b. Exam
 5. Neurologic
 - a. Motor
 - b. Sensory
 - c. Gait
 - d. Deep tendon reflexes
 - e. Cranial nerves
 - f. Abnormal reflexes
 6. Treatment plan: For each current diagnosis under treatment, identify current treatment, e.g., medication, tests and any intervention or monitoring by nursing or therapy (physical, occupational, speech, etc.)
 7. Physician's signature and date
- B. Meeting the medical history and physical exam requirement with existing records.
1. A previous hospital admission history and physical exam may be used if:
 - a. It is comprehensive and includes most of the points listed; **and**
 - b. It was done within the last three (3) months; **and**
 - c. It was accompanied by an update which was done within the last ten (10) days; **and**
 - d. It is accompanied by the previous records or information that are referenced.
 2. Additional modifications can be made to the admission history and exam if they are made on the copy, initialed and dated by a physician.
 3. Update
 - a. It must be done within the last ten (10) days;
 - b. It should cover any major episodes or hospitalizations that have occurred since the date of the hospital admission history and exam which is being used to satisfy this requirement; and
 - c. It should address the reason the person is being admitted to the nursing home and his/her physical condition at this time.
 4. Medical/Surgical consultations
 - a. If there is a medical condition, which is the reason for the nursing home placement and a consultant was involved with the care, then include a copy of the consultation and the key progress note.

- II. COMPREHENSIVE DRUG HISTORY (CURRENT OR IMMEDIATE PAST MEDICATIONS USE BY THE PERSON) DIRECTIONS: a) The objective of the Drug History Assessment is to determine al current or immediate past medication that could mask or mimic mental illness symptoms; b) Include all medications prescribed during the last month and the use of PRNs and any use of over-the-counter medications; this section may be dictated or the form below may be used; and c) Drug data can be compiled by physicians, nurses or other staff trained to use the forms; however, the Drug Assessment must be completed by a psychiatrist.

A. All medications

DRUG NAME/STRENGTH	DOSAGE INSTRUCTIONS/ FREQUENCY	REASON PRESCRIBED	DATE STARTED	DATE ENDED	ADDITIONAL INFORMATION, IF AVAILABLE: SIDE EFFECTS; LEVEL OF AWARENESS/SEDATION; ORTHOSTATIC BLOOD PRESSURE AND PULSE RATE; SERUM LEVEL

Individual Compiling Drug History Information

Date

- B. Assessment of drug history to be completed by psychiatrist performing the examination in Part IV. Are current medications masking symptoms or mimicking mental illness in this person?

Signature of Psychiatrist

Date

- III. PSYCHOSOCIAL EVALUATION DIRECTIONS: a) The object is to determine the individual's ability to engage in activities of daily living and the level of support that would be needed to assist the individual to perform these activities while in the community; b) The psychosocial evaluation requires the compilation of specific client information upon which the assessments in each category are based. The evaluation data should cover a minimum of two (2) years. If the person has been institutionalized the past two years, provide information regarding functioning level prior to institutionalization; c) The following forms are provided to organize the information that can be compiled by staff trained to go through the person's records. The assessment should be completed and signed off by a QMHP and should include information pertinent to how the individual's mental illness has effected his/her functioning level. This section may be dictated or the form below may be used.

A. Living Situation

Assessment

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B. Education

Highest Grade Completed	Year	Date of GED	List any post secondary education (place, credits, degrees, dates)
Special Education Classes			

C. Employment

Name of Employer	Position Title	Dates/Duration Held	Salary (Per Week)	Job Type (see key below)

Assessment

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WORK EXPERIENCE - This category refers to a time-limited training process using structured work activities to increase understanding of work value and demands as well as to develop work behavior or work skill.

SHELTERED WORK - This category refers to work for subcompetitive wages or salary in a workshop conducted by a nonprofit organization which provides work under special conditions for persons with disabilities.

SUBSIDIZED - This category refers to work where the employer (or employee) receives monetary inducements from another source to hire (be hired) noncompetitive candidates for work.

COMPETITIVE - This category covers work for remuneration in business, industry, government or other organizations that exercise selective hiring practices based upon qualifications of available applicants. Positions are not time-limited and pay a market wage.

VOLUNTEER WORK - This category refers to work activity where time/service is contributed to an organization that typically accomplishes work by individuals by volunteering.

D. Social History and Supports

1. Marital Status (Note Dates and Changes)

2. Children

Name(s)	Birthdate(s)	Custody Status Including Dates and Reasons for Changes in Custody Status	Additional Information

3. Significant Others (e.g., spouse, parent, landlord, public defender, employer)

Name(s)	Relationship	Additional Information

Assessment

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E. Substance Abuse/Illegal Drug Use

Types of Drugs	Amounts	When Use Began and Ended	Additional Information/Treatment History

Assessment

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F. Legal Status

<i>Check the Box Indicating Current Legal Status</i>	Dates	Additional Information
<input type="checkbox"/> Voluntary Admission <input type="checkbox"/> Involuntary Commitment <input type="checkbox"/> Protective Placement & Guardian		

Assessment

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G. Current Financial Support

Source	Amount	Begin Date	End Date

Assessment

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Signature of Qualified Mental Health Professional (QMHP)

Date Completed

- IV. FUNCTIONAL ASSESSMENT: a) The objective is to determine the individual's ability to engage in activities of daily living; b) include the level of support which would be needed to assist the individual to perform these activities while living in the community and where that level of support can be provided; c) data for this part of the assessment should be completed and signed off by any member of the team who meets the QMHP requirements.

Note: If the individual is dually diagnosed, completion of the Level II for persons with developmental disabilities meets the requirements for this section.

What level of support would this person need to assist him/her to perform this activity in the community?

Can this level of support be provided to the individual in an alternative community setting? If so, what setting?

Is this level of support such that NF placement is required?

1.	Self monitoring of health status (including monitoring and supervising one's own health status and self-administering medication and scheduling medical treatment).			
2.	Self-monitoring of nutritional status (eats balanced diet, appropriate snack foods, and fluids).			
3.	Handling money (does not do or has skills but does not have opportunity to do).			
4.	Dressing appropriately (on a daily basis; wears weather related clothing).			
5.	Grooming (personal hygiene, combs hair, brushes teeth).			

Signature of Qualified Mental Health Professional (QMHP)

Date Completed

- V. COMPREHENSIVE PSYCHIATRIC AND MENTAL STATUS EVALUATION DIRECTIONS: a) The objective is to determine the individual's psychiatric status and to determine whether or not the individual needs specialized services for those conditions; b) Include treatment history, recent and past psychiatric history, mental status exam, diagnoses and treatment recommendations; c) The data for this part of the assessment can be collected by staff trained to compile the past treatment information, but the assessment must be either reviewed and countersigned or completed by a board certified or board eligible psychiatrist.

A. Psychiatric and Mental Status Assessment

1. Psychiatric Treatment History

Inpatient/Outpatient Treatment History (start with most recent)	Name of Treatment Provider	Dates	Treatment Received	Treatment Outcome

2. Recent Psychiatric History
3. Past Psychiatric History
4. Mental Status Exam
 - a. General appearance
 - b. Psychomotor
 - c. Thought content: current abilities, overt behavior, suicidal/homicidal ideation, reality testing, presence and content of delusions and hallucinations
 - d. Thought form
 - e. Perceptions
 - f. Emotional state - Affect and mood
 - g. Orientation
 - h. Cognitive functioning and intellect
 - i. Judgement
 - j. Insight to his/her mental illness
5. Summary of findings, including review of current treatment plan
6. Diagnosis using DSM III-R (all five axes)
7. Specialized services recommendations for each psychiatric diagnosis (include medication and other biological treatments, psychosocial and rehabilitation services, and other symptom management or psychotherapy)

Psychiatrist's Signature

Date Completed

- B. Meeting the psychiatric/mental status requirement with existing records
1. A previous hospital admission history and psychiatric assessment may be used if:
 - a. It is comprehensive and includes most of the points listed; **and**
 - b. It was done within the last three (3) months; **and**
 - c. It is accompanied by an update that was done within the last ten (10) days; **and**
 - d. It is accompanied by the previous records or information that are referenced.
 2. Additions and modifications may be made to the admission history and psychiatric assessment if they are made on the copy, initialed and dated.
 3. Update
 - a. It must be done within the last ten (10) days; **and**
 - b. It should cover any mental illness or hospitalization that has occurred since the date of the hospital admission history and physical exam which is being used to satisfy this requirement.